

## Appendix A

# Accessing TARGET

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### Introduction:

Because we are transmitting private client data, the security of the TARGET system is very important. As such, access to TARGET is very restricted and several safeguards must be passed before you can use the system. This booklet is designed to guide you through the process gaining access to TARGET. To break down what can seem to be a daunting task into more manageable portions this booklet is divided into the following sections.

If you wish, you can use this guide as a checklist, marking off the steps as you proceed through the sections. You do not need to complete all of these sections in one sitting, but it is best to complete each section that you start.

<b>Section I</b>	<b>Getting Started</b> System Requirements Fax Agency Registration
<b>Section II</b>	<b>Fax Agency Registration</b>
<b>Section III</b>	<b>Applying for Your Digital Certificate</b> Online Application Notary Form
<b>Section IV</b>	<b>Token/Certificate Setup</b> Follow DST Installation Guide
<b>Section V</b>	<b>Registering at Transact Washington</b> Register with your Certificate Adding TARGET as a Service
<b>Section VI</b>	<b>Logging Into TARGET</b>
<b>Section VII</b>	<b>Frequently Asked Questions</b>
<b>Section VIII</b>	<b>Forms</b> Notary Form TARGET Agency Registration Form

## Section I

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### Getting Started

Before we get started take a minute to make sure that you have everything set up. A few moments spent now will save you headaches later on.

Your computer should at least meet these minimum requirements:

- Internet Explorer version 7 or above
- Internet access
- CD ROM drive
- Universal Serial Bus (USB) port
- Windows XP or above

## Section II

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### Fax TARGET Agency Registration Form

#### Fax TARGET Agency Registration Form:

Fax the **TARGET Agency Registration** form to DBHR. This form needs to be signed by your agency director or for county staff or ATR users, by the county Alcohol and Drug Coordinator. Explanations of the form fields are on page two of that form.

The fax number for DBHR is **360-407-0369**. A copy of the TARGET Agency Registration form is included in Section VIII for your convenience.

DBHR will fax you confirmation that your TARGET Agency Registration form was received. The **Agency User Notification** sent to you will include:

- TARGET user id
- TARGET password
- TARGET service code (for adding a service at Transact WA)

Please keep this form, as you will need this information in Section V, Registering at Transact Washington. You should continue the application process in Section III before receiving your Agency User Notification form.

You can expect to receive the Agency User Notification form within 5 business days. If you do not receive it within that time or have questions about this stage of the process, please call the Target Helpdesk at 888-461-8898.

## Section III

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### Applying for Your Digital Certificate

#### On-Line Application

1. Connect to the internet and go to the Transact Washington website located at: <http://transact.wa.gov>. If you are unable to view this site please contact your local technical support staff or Internet Service Provider.
2. Click on **Get Digital Certificate** on the left side of the page. This will open up a new browser window displaying the Digital Signature Trust (DST) web pages.
3. Follow the instructions on the Digital Signature Trust web site to complete the on-line portion of your application.

Because DST can change this part of the application process, step-by-step instructions are not given here – follow their screen prompts and use the following guidelines:

- Select a **2 Year High Assurance – Signing Certificate Only**
- Select a **“USB Token and Extension Cable”**.
- Use a valid e-mail account, as DST will be e-mailing you information about your application.
- Use a valid mailing address, as DST will be mailing information there.
- Be sure to mail in the completed **Notary Form** along with a copy of your identification to the address listed on the form. For your convenience a copy of this form is included in Section VII of this document. DST will not complete processing your application until this notarized form is received.

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You will be asked to provide a passphrase for your account at DST. Later, in the token setup process, you will be asked for another passphrase for your token. They can be the same if you like. **Remember these passphrases!**

**Failure to do so will result in you having to redo the certificate process as well as pay for a new certificate.**

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### **What you can Expect to Receive**

You will receive e-mail from DST confirming that your application request is being processed. You will receive another e-mail when your request has been reviewed and approved. Next, DST will mail you a **Welcome Kit**, which contains:

- A USB Token
- USB extension cable for connection to your computer's USB port.
- CD to install the DataKey CIP programs and drivers.
  - An installation guide is included on the CD.
- A cover page with account information, which you will need for retrieving your certificates in the next section.

You can expect to receive the Welcome Kit within 7 to 10 business days. If you do not receive it or have questions about this part of the process you can contact DST at 888-248-4447.

## Section IV

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### Token / Certificate Setup

#### **Print out and follow the Installation Guide:**

This guide is located on the CD sent to you from Digital Signature Trust and covers how to:

1. Install the DataKey software – to your PC's hard drive
2. Install the Token – connects to your PC, loads USB reader drivers
3. Configure the Token – by running the DataKey CIP software
4. Retrieving Digital Certificates – on-line process, places certificates on token
5. Preparing the Certificates for use – part of the on-line process
6. Downloading the Root Chain – installs device drivers to your PC's hard drive

If you do not have the CD or have questions on a portion of this process you can call Digital Signature Trust at **(888) 248-4447**.

Installing software requires administrative privileges on your computer. If you need help with gaining administrative privileges please contact your local technical support personnel.

**Please note: there are two passphrases to remember: the original DST passphrase (given while applying on-line), and the Token's passphrase (which allows access to the certificates on the token).**

You will probably be prompted to change your Token passphrase at some point during this process. Remember both the original DST and the new Token passphrase.

You will need the Token passphrase each time you log into Target and you will need the original DST passphrase if you have problems with the token and need to talk to the DST help desk.

Make sure that you follow all of their instructions step by step. Failure to follow all of the instructions will affect your ability to access Target.

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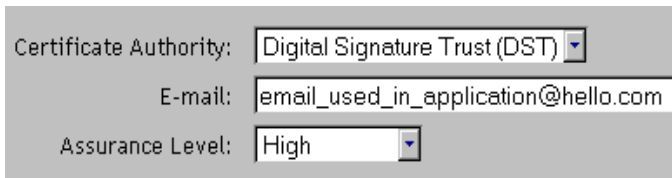
## Section V

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### Registering at Transact Washington

#### Registering your Certificate

1. **Plug in your token** whenever going to Transact Washington. Tokens should be taken with employees when they are not using the Target program (not left in the computer).
2. Connect to the Internet and open up Internet Explorer.
3. In the address bar of your browser type: <http://transact.wa.gov/> and press the Enter key.
4. Click on **Register My Certificate** on the left side of the web page.
5. Select **Digital Signature Trust**.
6. Enter the same e-mail address that you used in your application to Digital Signature Trust
7. Select **High** assurance level.
8. Click **Continue**.
9. On the next page click on **register this cert**.
10. Once this has been processed you will see a page that states that your certificate has been successfully added to the user registry.



The screenshot shows a registration form with three fields: 'Certificate Authority' with a dropdown menu set to 'Digital Signature Trust (DST)', 'E-mail' with a text box containing 'email\_used\_in\_application@hello.com', and 'Assurance Level' with a dropdown menu set to 'High'.

#### Adding TARGET as a Service

11. Click on the **myTransact Account** link located on the left side of the web page.
12. The Client Authentication window will pop up with your name and date certificate is valid for. Click OK
13. The Passphrase box will pop up and this is where you key in your Passphrase.
14. Click on the **Add a service** link.
15. In the Service Code box enter the TARGET service code that was sent to you by DBHR on the User Notification Form.
16. Click **Continue**.
17. Fill in the required fields.

It is important that the name and e-mail fields be the same as you had listed in your application to Digital Signature Trust

The TARGET User ID is your Target User ID supplied to you by DBHR on the User Notification form (this is not your password).
18. Click on the **Submit** button when you are done.

#### Accessing TARGET

Your ***request*** to add TARGET as a service will be reviewed within 48 hours, but turnaround time is usually faster. Once your request has been approved you will be able to click on the **DSHSDASA-TARGET2000** link on the myTransact page.



## Section VI

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### Logging Into TARGET2000

1. Plug your token into your computer's USB port.
2. Connect to the Internet and go to <http://transact.wa.gov/>
3. Click on the **myTransact Account** link.
4. Click [OK] at the Client Authentication window.
5. You will be prompted to enter your token passphrase. Enter the passphrase and click [OK]
6. Click on the link to **DSHSDASA-TARGET**.
7. Enter your TARGET User ID and TARGET password. This is originally provided to you in the User Notification form. Click [Enter]
8. If you have access to more than one agency then you will need to select an agency. You will only see those agencies that you have been authorized to access through the Agency Registration form.
9. If this is your first time in Target, and every 90 days thereafter, you will be prompted to change your password.

***Congratulations, you are now logged into TARGET!***

Just follow the steps in this section whenever you want to access TARGET.

## Section VII

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### Frequently Asked Questions

#### **How do I know what version of Internet Explorer I have?**

Open up your Internet Explorer. Click on Help. Click on About Internet Explorer. The Version number should be at least version 7 or above.

#### **How do I obtain a newer version of Internet Explorer?**

If your browser is not at least version 7 you can download a free upgrade from [www.microsoft.com](http://www.microsoft.com). Contact your local technical support if you are having trouble with the installation. Please note that this is a large file and depending on the speed of your connection could take some time.

#### **My USB port is not working.**

- Make sure the USB Token and/or cable is securely plugged into the computer.
- Check in the System Properties box by clicking on Start/ Settings/ Control Panel. Double-click on the System icon. Click on the Device Manager tab. Check to make sure that your Universal Serial Bus controllers are displayed (and no X's or question marks by them).
- Contact your agency's technical support staff.

#### **Why was my application to Digital Signature Trust refused?**

Your application may have been refused for a variety of reasons. Here are a couple of the more common reasons that we have encountered:

- Make sure that you use the same identification when applying for your certificate online as you do when filling out the Notary Form.
- Make sure that you have mailed in the Notary form.

#### **Why was my application to add Target as a service refused?**

Most commonly it is because either the TARGET Agency Registration Form has not been faxed in to DBHR or that the user id has been entered incorrectly. A copy of the TARGET Agency Registration form can be found in Section VIII. Your user id can be found on the User Notification form that DBHR has faxed back to you. Contact the Target Help Desk if you have any questions at 888-461-8898.

### **How many people can use a digital certificate?**

Each person is issued his or her own digital certificate. Only one person can use a single digital certificate. Do not share!

### **How do I pay for a digital certificate?**

Each agency is responsible for the cost of certificates. You can use a credit card or contact DST to arrange for a purchase order. It is recommended that at least two people in your agency have certificates so that you have a backup in case the primary data entry operator is out.

### **We have several computers; do we need to go through this entire process for each one?**

- You would need to go through the entire process once for each **person** that will be accessing TARGET2000.
- You will need to install the Token Manager software and Root Chain Certificate for each **computer** that will be accessing TARGET2000. Remember to also copy the certificate from the token to the computer (Copy to System button in the token software)

### **Now that I have access to TARGET, how do I use it?**

If you or some of your staff would like to attend a training session please contact the Target Help desk at 888-461-8898.

### **How do I create a shortcut to TARGET?**

You can create a shortcut by first navigating to <http://transact.wa.gov/> Click on File, Send, Shortcut to Desktop. This will place a shortcut to the Transact Washington website on your desktop.

You can also click on Favorites, Add to Favorites to add Transact to your list of favorites.

Note: It is important that you go to this first page of the Transact site. Trying to shortcut to any other page will cause sporadic problems when you are trying to enter information.

### **What do I do when one of my data entry personnel leaves the agency?**

Fax a TARGET Agency Registration form to DBHR indicating that this person should no longer have access to your agency's data. We will inactivate their access to Target. Since the employee is no longer going to be with your agency have them contact IdeTrust near their last day so they can have the TOKEN wiped clean of their information. Test to make sure it no longer works and now it is ready for next hire to walk through the purchase process using current existing Token.

**I have questions. Who do I contact?**

There are several sources that would be glad to assist you.

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|--|--|
| ▪ Problems with the digital certificate, Token Manager software or DST website         | <b>Digital Signature Trust<br/>1-888-248-4447</b>            |
| ▪ Questions about the application process, Transact, Target or other general questions | <b>DASA TARGET Help Desk<br/>1-888-461-8898</b>              |
| ▪ Problems with setting up your computer   | <b>Contact your agency's<br/>technical support personnel</b> |

## **Section VIII**

### **Forms**

#### **Explanation of the forms in this section:**

- **Notary form**

This form is used in the initial application for a digital certificate.

- **Agency Registration form**

Use this form to request access to Target. You will also need this form to change access rights. When an employee with access to Target leaves your agency, it is important to use this form to revoke their access to your agency's data. Please note that this form needs to be signed by your agency's director.

It is recommended that you make copies of these forms and keep the originals to use as a template.



## INSTRUCTIONS FOR STATE OF WASHINGTON PKI HIGH ASSURANCE LEVEL CERTIFICATE

Thank you for choosing Digital Signature Trust, LLC ("DST") to issue you a High Assurance Level Certificate for use in the State of Washington Public Key Infrastructure ("State of Washington PKI").

High Assurance certificates are issued when a Subscriber desires or a Relying Party requires a higher level of in-person authentication than what is provided by Intermediate or Standard Assurance Level Certificates. (A High Assurance certificate can also be used where an Intermediate or Standard Certificate is needed).

To complete the enrollment portion for your High Assurance Level Certificate, you must complete the following steps:

1. Take the attached Identification Form and Acknowledgment ("ID Form") to a **licensed Notary Public** (most banks have notaries on staff);
2. Present the Notary with:
  - (a) the ID Form, and
  - (b) the current state-issued ID card or drivers license that you reported to DST on the application screen, and
  - (c) a second form of identification, which may be a valid passport, military ID, college or university photo ID, an alien registration card, a major credit card, an employee photo ID card containing your employer's name and address, your social security card, or a recent utility bill (with your name and address that must match the address you reported on the application screen);
3. Sign the ID Form **in the presence of the Notary**;
4. Have the Notary verify your identity by (a) reviewing and recording on the ID Form the information from your two forms of ID, and (b) attaching photocopies of your two forms of ID to the ID Form;
5. Make sure the Notary has (a) properly notarized your signature, (b) affixed his or her raised seal or colored ink stamp, (c) included all pertinent information from your two forms of ID, (d) attached a copy of each ID, and (e) filled in his or her employer information; and

6. Make and keep a copy of the notarized ID Form and send the originals  
by mail to: by courier to:

*State of Washington PKI*  
c/o Digital Signature Trust, LLC  
P.O. Box 22930  
Salt Lake City UT 84122-0930

*State of Washington PKI*  
c/o Digital Signature Trust, LLC  
255 North Admiral Byrd Road  
Salt Lake City UT 84116-3703

## Identification Form and Acknowledgement

### State of Washington PKI – High Assurance Level Certificate

You, the undersigned applicant ("Applicant"), have applied for a State of Washington High Assurance Level Certificate (the "Certificate"). Applicant should already have accepted the online Agreement for High Assurance Level Certificate ("Subscriber Agreement"). By signing below, Applicant further represents, warrants and attests that all facts and information provided by Applicant to DST during the application process are current, complete, true and not misleading. Applicant also represents, warrants and agrees that Applicant:

- a) is applying for issuance of a High Assurance Level Certificate;
- b) is who Applicant represents himself or herself to be; and
- c) has read, understands, and agrees to be bound by all of the terms and conditions of the Subscriber Agreement and the other documents referenced therein, including all responsibilities associated with being the Subscriber of a Certificate.

Print Name: \_\_\_\_\_  
(First Name, Middle Initial, Last Name)

E-mail Address: \_\_\_\_\_

Signature: \_\_\_\_\_  
(Sign Only In The Presence Of Notary)

State of \_\_\_\_\_

County of \_\_\_\_\_

I hereby certify that on this \_\_\_\_ day of \_\_\_\_\_, 200\_\_, personally appeared before me the signer and subject of the above form, who signed or attested the same in my presence, and presented the following two forms of ID as proof of his or her identity, **BOTH OF WHICH I HAVE PHOTOCOPIED AND AFFIXED TO THIS FORM:**

1. \_\_\_\_\_  
Exact Name Listed on State ID      Serial Number of State ID      Expiration      ID Type (e.g., Wash. DL)

2. \_\_\_\_\_  
Exact Name on other ID      Serial/Account Number      Expiration      ID Type\*

\*Valid passport, military or college ID, alien registration, major credit card, employee badge, social security card, or recent utility bill.

Notary Public \_\_\_\_\_

Residing in: \_\_\_\_\_

My Commission Expires: \_\_\_\_\_

\_\_\_\_\_  
Name of Organization Employing Notary

\_\_\_\_\_  
Street Address, City, State, Zip Code

Space Reserved for Notary Seal



## Agency Registration

Washington State Division of Behavioral  
Health and Recovery (DBHR)

Agency Name (or County if county staff)

Fax #

<b>Step 1</b>	<b>For All Users</b>		
	a) Name [Last, First, Middle Initial]		g) Agency #'s or County
	b) Phone number                      c) E-mail address		
	d) User status <input type="checkbox"/> New User <input type="checkbox"/> Remove User <input type="checkbox"/> Add/Change User Type <input type="checkbox"/> Add Agencies for User	e) Select user type(s) <input type="checkbox"/> TARGET- Data Entry <input type="checkbox"/> ATR (Access to Recovery) <input type="checkbox"/> TARGET – Reports <input type="checkbox"/> SCOPE <input type="checkbox"/> TARGET – ADATSA	
	f) User Signature		
<b>Step 2</b>	<b>For All Users</b>		h) Date
	This form must be signed by the treatment Agency Director or, for county staff, by the County Drug and Alcohol Coordinator.		i) Print Name
			j) Authorizing Signature
<b>Step 3</b>	<b>For ATR Users Only: Fax to County Alcohol and Drug Coordinator</b>		l) Date
	k) ATR user type <input type="checkbox"/> RSS <input type="checkbox"/> RSS-Data Entry Only <input type="checkbox"/> ATR Interview Only – Data Entry (GPRA) <input type="checkbox"/> ATR County Rate Manager/Provider List Manager		m) Print Name
			n) Signature of County Coordinator
<b>Step 4</b>	<b>For All Users</b>		
	Please Mail to: DBHR TARGET2000 Helpdesk, PO Box 45600, Lacey, WA 98503 or Fax to (360) 407-0369.		



## Agency Registration

The Target Agency Registration Form is used to manage access and user rights on the Target system. Each person that wishes to use Target must complete this form and have it signed by either their agency director or, for county staff, by the County Alcohol and Drug Coordinator.

This form is also used to request that a user's access to Target be revoked if the user changes positions or leaves the employment of the agency or county.

With the exception of Step 3, which is conditionally required, please fill out all portions of this form.

### Step 1

#### d) User Status Definitions:

**New User:** Select this option for new users to Target

**Remove User:** Remove access for selected user

**Change User Type:** Add or change user rights

**Add Agencies for User:** Add access to more agencies for selected user

#### e) User Type Definitions:

**TARGET Data Entry:** Able to input data and run reports

**TARGET Reports:** Reports only, no data entry

**TARGET ADATSA:** Able to enter ADATSA assessments or admissions

**SCOPE:** Report generating program. Users must also register at [www.scopewa.net](http://www.scopewa.net)

**ATR:** (Access To Recovery) Able to perform the various ATR functions. If you select this then Step 3 must be completed as well.

#### g) Agency #s or County

**Agency Number:** If the user works at a treatment agency, enter the six-digit "Greenbook" number for the agency or agencies for which access is to be given

**County:** If the user works for the county, enter the name of the appropriate county

### Step 2

#### i,j) Authorizing Signature

Printed name and signature of the treatment agency director or, for county staff, by the County Drug and Alcohol Coordinator.

### Step 3

This section must be completed if the user is requesting access to ATR functionality within Target. All other users may skip this section.

#### k) ATR User Type

**RSS:** Authorizes services, creates vouchers, documents eligibility, add and edit recovery plan, interviews (GPRA's), ATR reports

**RSS – Data Entry Only:** Creates vouchers, documents eligibility, add and edit recovery plan, interviews (GPRA's)

**ATR Interview Only – DATA Entry (GPRA):** access to interview screens (GPRA) for data entry

**Reports Only:** ATR reports only, no data entry

**ATR County Rate Manager/Provider List Manager:** Add and change the County Rate Table and the Provider list

#### m,n) Signature of County Coordinator

The printed name and signature of the Drug and Alcohol Coordinator in your county or another person specifically authorized to approve ATR access must be obtained.

### Step 4

Once this form is received by DBHR it will be processed. Any return correspondence will be sent to the fax number provided in the initial section of the form.

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**TARGET Access and Digital Certificate site:** <http://transact.wa.gov>

**TARGET Forms and Documentation:** <http://www.dshs.wa.gov/dbhr/daT2KMain.shtml#dbhr>

**DST Help Desk...change to: IdenTrust Help Desk:** 888-248-4447 (for questions concerning your digital certificate)

**SCOPE Site:** [www.scopewa.net](http://www.scopewa.net)

Please contact the **TARGET Help Desk** at **888-461-8898** if you have any questions.

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